

Client Account and Information Management System and Method

ABSTRACT

An information repository and management system for data regarding a client base which integrates a plurality of information types including database records, word processor files, e-mail, other hyperlinked documents, web pages and web sites. Implemented as a database application on a web-enabled database server, sales and marketing team members may access the system through an intranet or remotely through an Internet. Portions of the database may be extracted and placed on a portable computing device for traveling purposes. The extracted database can be later synchronized with the central database upon return of a sales and marketing team member from a meeting or business trip. Links and expandable subforms are provided to web sites for stock quoting and client home pages, allowing sales team members to quickly gather information regarding a company's latest news announcements, stock performance, and financial status. Client relationship documents, such as meeting summaries, previous meeting briefing packages, and action item tracking sheets are organized and accessible through the system.